DELBERT HOSEMANN
Secretary of State

Mississippi Secretary of State

The Lobbying Online Reporting System

Client User Guide

Table of Contents

> *Click on the table of contents item you want to view to be taken directly to it*

Logging in as a Client

While you can search for reports without logging in to the Web Portal, you must log in to submit filings.

To log in to the Web Portal, you must be a registered user and your lobbyist will register you.

1. In your web browser, go to
https://sos.ms.gov/elec/portal/msel2/page/onlineFiling/portal.aspx
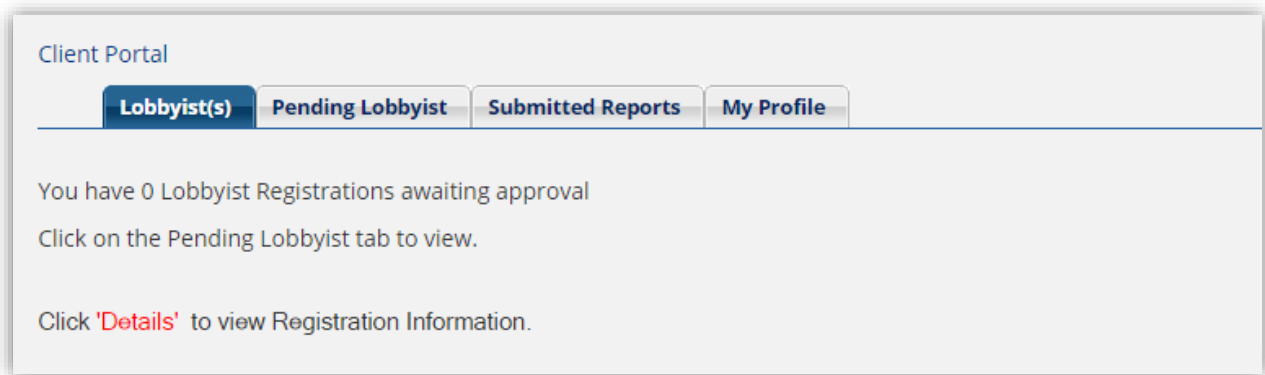The Elections home page displays.

2. Click the **Clients** link on the left side of the page.
3. The *Registered Client* login screen displays.
4. Enter your Username and Password.
   a. *Your Username and Password were emailed to you when your lobbyist registered you as a client.*
5. Click the **(Login)** button.
6. This will bring you to the *Client Portal* home screen.

Tabs

Notice the tabs across the upper portion of the Client Portal screen.

Client Portal

| Lobbyist(s) | Pending Lobbyist | Submitted Reports | My Profile |

You have 0 Lobbyist Registrations awaiting approval

Click on the Pending Lobbyist tab to view.

Click 'Details' to view Registration Information.

Clicking on the tabs takes you to different parts of the site.

Here you may navigate between:

- Lobbyists
- Pending Lobbyist
- Submitted Reports
- My Profile

Lobbyist(s) Tab

The Lobbyist(s) tab is the default tab that you come to after logging in as a Client.

Here you may view and create *Annual Reports* and view your *Lobbyist's Registration Filings*.

View Lobbyist Registration Filings

1. Choose a year from the dropdown menu to display that years filing.

2. Click the **Details** Link to go to a screen that shows lobbyist and client Registration Information.

3. At the bottom of that screen you will see a Client Actions Box. In the Client Actions box click on the **(Open Certificate)** button to see the *Lobbyist's Registration* Form.

Create an Annual Report

1. Click on the **(Create Annual Report)** button.

*(Here you may also continue filing Pending Reports by clicking the Details link that corresponds with the Form that you would like to continue filing. Clicking the [checkbox] that corresponds with the form will select it, if the form needs to be deleted you may then click the **(Delete Reports)** button at the bottom of the page.)*

2. Click on the button that corresponds with the reporting year you wish to create a report for.

Annual Report

Select reporting year

| 2012 | 2013 | 2014 | 2015 |

3. The next screen will be the *Form C – Client Annual Report*.
4. At the top is the *Client Administrative Costs*.

::Client Annual Report

Client Administrative Costs

Overhead :

Reimbursement(s) To Lobbyist :

Direct Payments :

Lobbying Expenses :

Urging Others To Communicate (advertising, direct mail, etc.) :

Food and Beverage, Travel, Lodging and Entertainment. DO NOT include Receptions :

Gifts, loans, honorariums, Any other thing of Value :

Add/Edit Admin Costs

5. To edit or add to these costs click the **(Add/Edit Admin Costs)** button.
6. This will take you to a *Client Administrative Cost* form.

Overhead

Reimbursement(s) To Lobbyist

Direct Payments

Lobbying Expenses

Urging Others To Communicate (advertising, direct mail, etc.)

Food and Beverage, Travel, Lodging and Entertainment. DO NOT include Receptions

Gifts, loans, honorariums, Any other thing of Value

Cancel   Next

Fill out the *Client Administrative Cost* form and click the (Next) button.
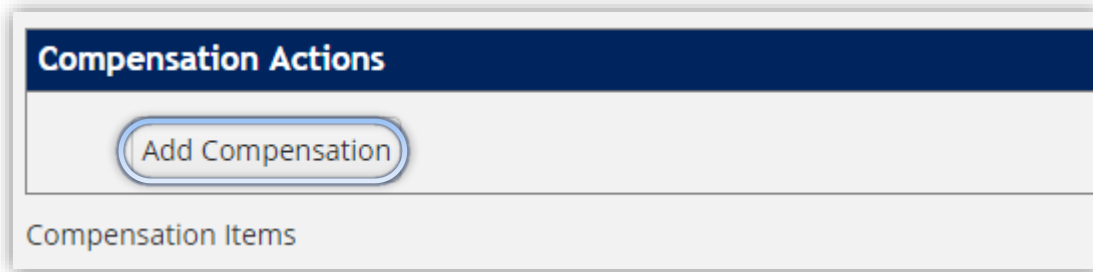
7. After you click **(Next)** the *Form C – Client Annual Report* screen comes back with your changes added to the *Client Administrative Costs* section.

Compensation Actions

Here you may Add Compensation, Edit Compensations, and Delete Compensations.

1. Click the **(Add Compensation)** button.
2. Next a *Client Lobbyist Compensations* form will appear.

Fill out the form and click the (Next) button.

3. Next you will be brought back to the *Form C – Client Annual Report* screen with your new Compensation added.

4. If the information in a compensation item is incorrect, you may make corrections. Click the [checkbox] that corresponds with the compensation you need to edit and click the **(Edit Compensation)** button to go back to the *Client Lobbyist Compensations* form.

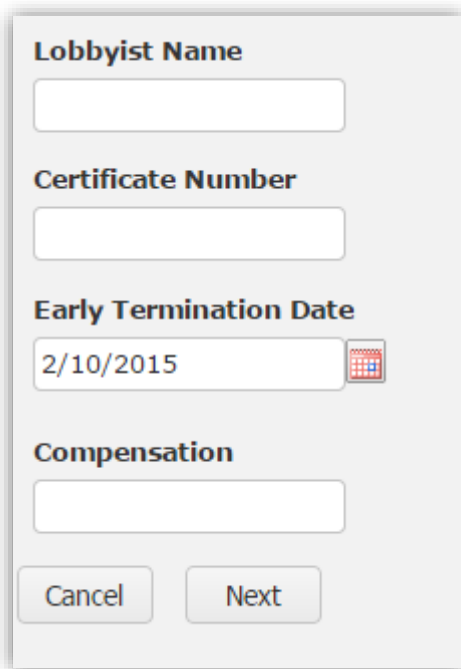5. To delete a compensation click the [checkbox] that corresponds with the compensation item you need to delete and click the **(Delete Compensations)** button.

Expenses Actions

Here you may either add expenses directly or Import Expenses from Spreadsheet. In order to import expenses from spreadsheet you will need to have the *Lobbyist Expense Template* downloaded from the Lobbyists tab.

1. To add expenses manually click the **(Add Expenses)** button to be taken to a *Lobbying Expenditure* screen.

Recipient

Date

Provider

Item Description

Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

Recipient's Office Title

Governor

Place

Expense Type

Award

Value/Cost

Cancel   Next

Date

08/01/2014

	August 2014					
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Type the date into the Date box or click on the [calendar] calendar button to bring up a calendar and select a date.

2. When all of the required fields are filled out click the **(Next)** button to be taken back to the *Form C – Client Annual Report screen*.

Import Expenses from Spreadsheet

> To upload expenses using a spreadsheet you will need to download and use the Lobbyist Expense Template.

1. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template may be downloaded from the Expenses Actions.

2. You may Import Expenses from a Spreadsheet by clicking on the **(Import Expenses From Spreadsheet)** button.

3. Next you will come to a screen where you may choose a file from your computer.

4. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.

The Secretary of State seal and Delbert Hosemann, Secretary of State masthead appears at the top of the page.

Click on the Excel Sheet you wish to upload and click the **(Open)** button.
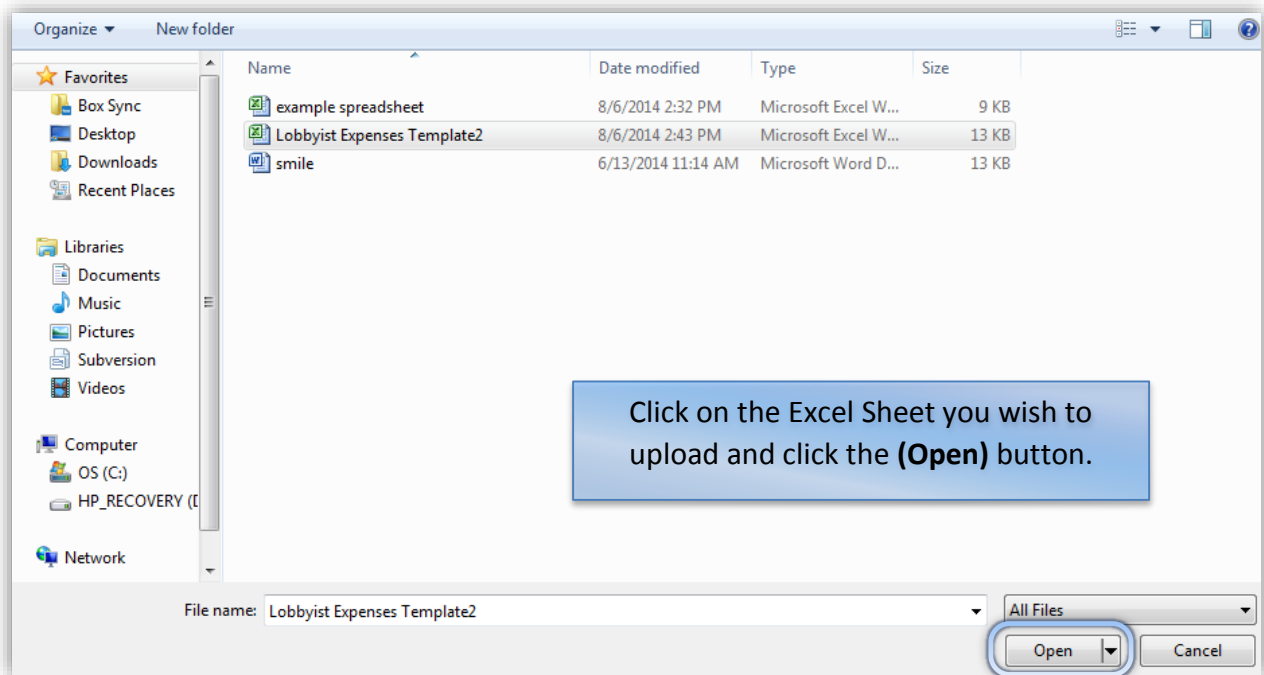
Next you should see the file you opened in the *Choose File* box and an **(Upload)** button has appeared.

Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

Choose File | Lobbyist Expenses Template2.xlsx | Upload | Cancel
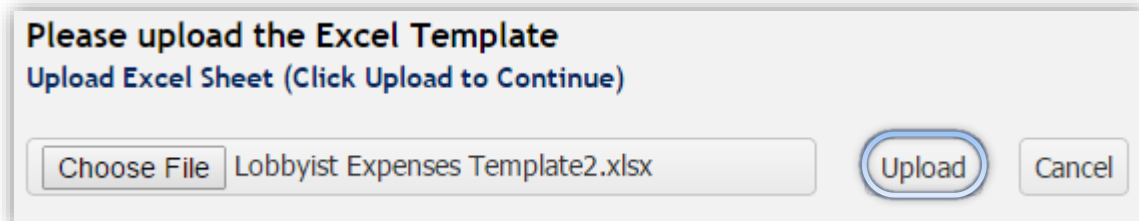
5. Click the **(Upload)** button to import your Excel Sheet.
6. Next you will be brought back to the Form C – Client Annual Report screen.

Expenses Actions

| Add Expenses | Import Expenses From Spreadsheet | Download Lobbyist Expense Template |

Expense Items

☐Select All

	Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type
☐	Recipient	Governor	Feb 2 2015	Place	Provider	Award

☐Select All

| Edit Expense | Remove Expense |

7. If the information in an Expense item is incorrect, you may make corrections. Click the [checkbox] that corresponds with the Expense item you need to edit and click the **(Edit Expense)** button to go back to the *Lobbying Expenditure* form.
8. To delete an Expense item click the [checkbox] that corresponds with the expense item you need to delete and click the **(Remove Expense)** button.

Receptions Actions

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

- Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.
- Fill in the rest of the boxes
- Click the **(Next)** button when you are finished.

2. After you click the **(Next)** button you will be taken back to the Form C – Client Annual Report screen that shows your newly entered Reception Action.

Reception Items

Select All

Date	Place/Location	Est. No. Public Officials	Est. Total At
☐ Feb 2 2015	City MS	1200	5000

Select All

Edit Receptions   Remove Receptions

3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.

Report Actions

You may see a preview of the Annual Report by clicking the **(Preview Report)** button.

Report Actions

Preview Report   Submit Annual Report

1. When the report is complete click the **(Submit Annual Report)** button.
2. Once the report is submitted the process cannot be reversed.

Submit Report

You are about to Submit Annual Report. This process can not be reversed.

SUBMIT   CANCEL

3. Click the **(SUBMIT)** button.

Form C

Client Annual Report submitted!!

OK

4. Click the **(OK)** button to finish and you will be directed to the *Submitted Reports* tab.

| Lobbyist(s) | Pending Lobbyist | **Submitted Reports** | My Profile |

Submitted Reports

☐ Select All

		File Number	Report Type
☐	View/Print	LC20150021	Form C

Pending Lobbyist Tab

1. Here you may view Lobbyist Registrations that are pending approval.

2. Click the Details link to approve or reject the Lobbyist Registrations.

On the Client Pending filings information screen, scroll all the way to the bottom of the page to see the Approve or Reject buttons.

3. Here you may either click the **(Approve)** button to approve the Lobbyist Registration or click the **(Reject)** button to reject it.

Submitted Reports Tab

In the Submitted Reports tab you may View, Print or Amend Reports.

		File Number	Report Type	Report Status

Lobbyist(s) | Pending Lobbyist | **Submitted Reports** | My Profile

Submitted Reports
☐ Select All

		File Number	Report Type	Report Status
☐	View/Print	LC20150021	Form C	Filed - Client Report
☐	View/Print	LC20150017	Form C	Filed - Client Report
☐	View/Print	LC20140034	Form C	Filed - Client Report
☐	View/Print	LC20140030	Form C	Filed - Client Report
☐	View/Print	LC20140013	Form C	Filed - Client Report
☐	View/Print	LC20130021Ad	Form C - Amended	Filed - Client Report
☐	View/Print	LC20130019	Form C	Filed - Client Report
☐	View/Print	LC20130018	Form C	Filed - Client Report

View/Print Report(s)   Amend Report(s)

- Click the [checkbox] corresponding with the report you want to use
- Once the [checkbox] is checked you may click the **(View/Print Report(s))** button to bring up a printable version of the report. You may also click the **(Amend Report(s))** button to open the report for editing.
- The **View/Print** link can also be click in order to bring up a printable version of the report.

My Profile Tab

- Here you may click on the **(View/Edit My Profile)** button to view and change your profile.
- You will be directed to a form where you man change your name, physical/mailing address, and contact information.

Entity Name

Name

[_____] *

Physical Address Information

Address 1 **Address 2(eg: Suite# 201)** **City** **State**

[_____] * [_____] [_____] * MISSISSIPPI ▾

Zip

[_____] *

☐ **Mailing address same as Physical**

Mailing Address Information

Address 1 **Address 2(eg: Suite# 201)** **City** **State**

[_____] * [_____] Jackson MISSISSIPPI ▾

Zip

36695-1221

Contact Information

First Name **Middle Name** **Last Name**

[_____] * [_____] [_____] *

Title **Telephone 1** **Fax**

[_____] (|___) ___-____ x_____ [_____]

Email **Confirm Email**

[_____] * [_____] *

Cancel   Next

- Click the **(Next)** button when you have filled out the form.

- Click the **(Next)** Button to update the information.

- Click the **(OK)** button.

Change Password

When you need to change your password for any reason click the **(Change Password)** button.

User passwords cannot be blank. Password are case sensitive.

- Enter your old password in the top '*Old Password*' box
- Enter your new password in the middle '*New Password*' box
- Enter your new password again in the bottom '*New Password (Confirm)*' box
- Click the **(Update)** button.